

# **REQUEST FOR QUALIFICATIONS AND FEES (RFQF)**

## **Somerville Retirement Board (SRB)**

### **Organizational Review of the Administration of the Somerville Retirement System (SRS)**

Sealed proposals will be received at the SRS Office, City Hall Annex, 50 Evergreen Avenue, Somerville, MA 02145, until **4:30 PM, October 22, 2012** for the furnishing of the following to the SRB:

***The SRB is soliciting proposals from professional consulting firms or individuals to assist the Board with an organizational review of the SRS Administration. The successful Offeror will be required to provide complete consulting services commencing November 2012.***

Copies of the RFQF may be obtained from the SRS office on and after **October 1, 2012**, between the hours of 8:30 AM to 4:30 PM, Monday – Wednesday, 8:30 AM to 7:30 PM on Thursdays and 8:30 AM to 12:30 PM on Fridays.

Digital copies of the RFQF may be downloaded from the City of Somerville's website at <http://www.somervillema.gov/departments/finance/purchasing/bids> or the SRS's website at: <http://www.somervillema.gov/departments/retirement>.

The successful Proposer must be an Equal Opportunity Employer.

Questions concerning the RFQF must be submitted in writing **by 4:30 PM, October 15, 2012** to Edward Bean, Vice-Chairman, SRB, at the address above; by fax number at (617) 623-3852 or through e-mail to [ebear@somervillema.gov](mailto:ebear@somervillema.gov). Answers will be sent via addendum to all vendors who received this RFQF through the Somerville Retirement Office.

The SRB reserves the right to reject any or all proposals, waive minor informalities, and accept the proposal deemed to be in the best interest of the SRS.

**Proposals will be accepted in the following format: Two sealed envelopes - One envelope containing one original and four copies of the non-price technical proposal marked: "Non-Price Proposal — Organizational Study" and one envelope containing one original and two copies of the price proposal marked "Price Proposal — Organizational Study" must be received by the Procurement Officer, SRS, City Hall Annex, 50 Evergreen Avenue, Somerville, MA 02145, no later than 4:30 PM, October 22, 2012.**

**(Note: If price proposal is included in the non-price envelope, the proposal will be automatically disqualified.)**

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#### **INSTRUCTIONS TO PROPOSERS**

1. Massachusetts General Laws, Chapter 30B requires that price proposals must be separate from technical proposals. Therefore, **please make no reference to pricing in the non-price technical proposal.** Failure to adhere to this requirement will result in disqualification. It is the sole responsibility of the Proposer to insure that the proposal arrives on time at the designated place. Late Proposals will not be considered, and will be returned. Refer to the cover page of this RFQF for instructions on how each sealed envelope containing proposals shall be labeled, and when proposals are due.

The SRB plans to award one contract to the responsive and responsible proposer offering the best proposal.

2. The signature of the vendor's authorized official(s) must be provided on all proposal forms.
3. All information in the Proposer's proposal should be organized and presented as directed in Sections I, II & III below. Accuracy and completeness are essential. The successful proposal will be incorporated into a contract; therefore, Proposers should not make claims to which they are not prepared to commit themselves contractually.
4. The Price Summary Form in Section IX must be completed. **No substitute form will be accepted.** Pricing must remain firm for the entire contract period.
5. Failure to answer any question, to complete any form or to provide the documentation required will be deemed non-responsive and result in automatic rejection of the bid unless the SRB determines that such failure constitutes a minor informality, as defined in Chapter 30B.
6. All interpretations of the RFQF and supplemental instructions will be in the form of written addenda to the RFQF specifications. Requests for clarification or any questions about information contained in the RFQF should be addressed in writing to Tony Ferrelli, Procurement Officer, Somerville Retirement System, 50 Evergreen Avenue, Somerville, MA 02145. Email: [tferrelli@somervillema.gov](mailto:tferrelli@somervillema.gov). Fax: (617) 666-4325. No requests or questions will be accepted after **4:30 p.m., October 22, 2012.** Questions and answers will be compiled and sent to all proposers who requested a copy of the RFQF, by addendum via email, before the proposal deadline.

# **REQUEST FOR QUALIFICATIONS AND FEES (RFQF)**

## **Somerville Retirement Board (SRB)**

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#### **SECTION I - OVERVIEW**

The SRB seeks a professional consulting firm or individual(s) to assist the Retirement Board with an organizational review of the administration of the Retirement System. The review must be completed within six (6) weeks and will result in strategic recommendations and an implementation plan based upon the evaluation's findings and the SRB's needs.

On August 18, 2011, the Public Employee Retirement Administration Commission (PERAC) completed an audit of the Somerville Retirement System (SRS) covering the period from January 1, 2008 to December 31, 2009. The audit called for a "reevaluation of the system administration" with a recommendation that the SRB "establish a formal management chart and a written manual that explicitly identifies the rules, rights, responsibilities and functions of the SRS staff. Specific duties, supervisory lines of organization and how the staff interacts with the Board must be clarified".

The Retirement Board's objective is to establish a new organizational structure that will strengthen the capacity to manage the responsibilities of the System as required by M.G.L. Chapter 32. Goals are to maximize staff efficiency, productivity, and member satisfaction.

The Retirement Board believes a key component in a new organizational structure is the creation of an Executive Director or Retirement System Administrator position vested with the responsibility to oversee all staff operations.

The current staffing configuration includes the following: Executive Secretary to the Board, Systems Accountant, Head Clerk, Principal Clerk. All positions are represented by the Somerville Municipal Employees Association.

#### **SECTION II - SCOPE OF SERVICES**

The consultant shall complete the following basic tasks in the prescribed timeline for completion. Means and methods may be modified with the approval of the SRB.

1. Vendor will report directly to the SRB maintain ongoing communications with a designee from the SRB.
2. Vendor's role will be to work with City staff (primarily City Auditor, Personnel Director, Labor Counsel) and Retirement System staff to perform the work described in this scope of services and deliver an organizational review of the SRS Administration.
3. Vendor will review the SRS's entire organizational structure to gain an understanding of the SRS staff responsibilities and functions. This review should include an examination of current job descriptions, specific duties, supervisory lines of organization, and how the staff interacts with the SRB.

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#### **SECTION II - SCOPE OF SERVICES (continued)**

4. Vendor review of staff capacity vs. workload & organization's technical capabilities.
5. Vendor will review collective bargaining provisions that affect the efficient operations of the department.
6. The vendor will review organizational structures in model Massachusetts Retirement Systems and provide a comparative analysis to the SRS organizational structure.

#### **Vendor must provide the following deliverables:**

- a. An appropriate staffing configuration with new or revised job descriptions containing the qualifications needed to carry out the responsibilities of Retirement System Administration.
- b. A job description for an Executive Director or Retirement System Administrator position
- c. A recommended Salary Range for the Executive Director/Retirement System Administrator
- d. An organizational chart delineating authority and staff relationships to the Retirement Board.

Vendor will prepare an organizational review document including job descriptions electronically and be prepared and available to present the findings and recommendations of the review to the SRB and relevant city officials.

#### **SECTION III - COMPARATIVE EVALUATION CRITERIA**

The Comparative Evaluation Criteria set forth in this section of the RFQF shall be used to evaluate responsible and responsive proposals. Comparative Evaluation Criteria include:

##### **Written Proposal**

##### **Highly Advantageous**

The proposal outlines a clear and comprehensive work plan that addresses all of the areas of interest as well as the core elements of the review as specified in the scope of services.

##### **Advantageous**

The proposal outlines a clear and comprehensive work plan that addresses most of the areas of interest and most of the core elements of the review as specified in the scope of services.

##### **Not Advantageous**

The proposal does not present a clear and comprehensive work plan or does not address the areas of interest nor the core elements of the review as specified in the scope of services.

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#### **SECTION III - COMPARATIVE EVALUATION CRITERIA (continued)**

##### **Unacceptable**

The proposal does not present a clear and comprehensive work plan and does not address the areas of interest nor the core elements of the review as specified in the scope of services.

##### **Experience**

##### **Highly Advantageous**

Vendor has at least five (5) years of experience providing organizational consulting services to municipalities, including multiple reviews of Massachusetts Retirement systems.

##### **Advantageous**

Vendor has at least three (3) years of experience providing organizational consulting services to municipalities, including at least one review of a Massachusetts Retirement System.

##### **Not Advantageous**

Vendor has at least three (3) years of experience providing organizational consulting services to municipalities, but has not completed a review of a Massachusetts Retirement System.

##### **Unacceptable**

Vendor has less than three (3) years of experience providing organizational consulting services to municipalities and not completed a review of a Massachusetts Retirement System

##### **Project Timeline & Availability to Complete Work**

##### **Highly Advantageous**

Available to begin work within fifteen (15) days of contract and complete the project within 30 days of contract.

##### **Advantageous**

Available to begin work within fifteen (15) days of contract and complete the project within 90 days of contract.

##### **Not Advantageous**

Available to begin work within thirty (30) days of contract and complete the project within 120 days of contract

##### **Unacceptable**

Not willing to commit to availability and a project timeline.

**REFERENCE FORM – CONSULTANT SERVICES**

**3 client references REQUIRED, two of which must be public entities**

**Name of Firm Submitting Proposal:** \_\_\_\_\_

**Reference #1**

Firm Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Description and date(s) of services provided: \_\_\_\_\_

\_\_\_\_\_

**Reference #2**

Firm Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Description and date(s) of services provided: \_\_\_\_\_

\_\_\_\_\_

**Reference #3**

Firm Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Description and date(s) of services provided: \_\_\_\_\_

\_\_\_\_\_

**Price Submission Form**

**Fee Breakdown**

Scope of Review Services	Total Fees

Name (print): \_\_\_\_\_

Signature: \_\_\_\_\_

Title of Person Submitting Fee Proposal: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Date: \_\_\_\_\_